

Mission

The mission of the Waukesha County Department of Senior Services is to affirm the dignity and value of older people through services, support and opportunities which promote choice, independence and community involvement.

Financial Summary

	2002 Actual	2003 Adopted Budget	2003 Estimate	2004 Budget	Change from 2003 Adopted Budget	
					\$	%
General Fund						
Expenditures	\$1,753,406	\$2,092,661	\$1,996,145	\$2,192,433	\$99,772	4.8%
Revenues	\$850,674	\$902,311	\$898,805	\$974,081	\$71,770	8.0%
Tax Levy (b)	\$902,732	\$1,190,350	\$1,097,340	\$1,218,352	\$28,002	2.4%
Nutrition Fund						
Expenditures	\$991,841	\$1,068,700	\$1,062,724	\$1,146,074	\$77,374	7.2%
Revenues (a)	\$825,035	\$876,888	\$873,240	\$958,068	\$81,180	9.3%
Tax Levy (b)	\$166,806	\$191,812	\$189,484	\$188,006	(\$3,806)	-2.0%
Total All Funds						
Expenditures	\$2,745,247	\$3,161,361	\$3,058,869	\$3,338,507	\$177,146	5.6%
Revenues	\$1,675,709	\$1,779,199	\$1,772,045	\$1,932,149	\$152,950	8.6%
Tax Levy (b)	\$1,069,538	\$1,382,162	\$1,286,824	\$1,406,358	\$24,196	1.8%

(a) Includes Nutrition fund balance appropriations of \$41,000 in the 2003 adopted budget and \$10,150 in the 2004 budget.

(b) Adopted Tax Levy for 2002 was actually \$1,330,418 - General Fund \$1,161,374 and Nutrition Fund \$169,044. Amount shown is actual expenditures minus actual revenues, a total difference of \$260,880 from the 2002 Adopted Tax Levy Budget, a difference of \$258,642 in the General Fund and \$2,238 in the Nutrition Fund.

Position Summary (FTE)

Regular Positions	16.75	16.75	16.75	21.05	4.30
Extra Help	6.24	6.26	6.28	2.38	(3.88)
Overtime	0.26	0.21	0.21	0.22	0.01
Total	23.25	23.22	23.24	23.65	0.43

General Fund**Senior Services****Fund Purpose/
Summary****Fund Purpose**

The Department of Senior Services General Fund operations are responsible for planning, providing, and coordinating programs that address the needs of Waukesha County older adults and their caregivers. These programs provide supportive services and opportunities including adult day centers, case management, chore services, community services, emergency intervention, health cost sharing, homemaker services, information and assistance, legal/benefit assistance, outreach, personal care, respite, specialized transportation, and volunteer services. The General Fund also includes Department activities as the lead-reporting agency for instances of Elder Abuse and Neglect in Waukesha County.

The Department of Senior Services is an entry point for accessing services in the aging network. As a resource center for departments, community agencies, organizations and individuals, the Department encourages collaboration and coordination of resources, activities, and programs serving older people. The General Fund is comprised of three organizational areas: Administration, Information and Assistance, and Program Monitoring and Evaluation.

Financial Summary

	2002 Actual	2003 Adopted Budget	2003 Estimate	2004 Budget	Change from 2003 Adopted Budget	
					\$	%
General Fund						
Personnel Costs	\$675,324	\$742,632	\$738,349	\$785,134	\$42,502	5.7%
Operating Expenses	\$1,020,154	\$1,252,256	\$1,161,408	\$1,297,806	\$45,550	3.6%
Interdept. Charges	\$57,928	\$97,773	\$96,388	\$109,493	\$11,720	12.0%
Fixed Assets	\$0	\$0	\$0	\$0	\$0	N/A
Total Expenditures	\$1,753,406	\$2,092,661	\$1,996,145	\$2,192,433	\$99,772	4.8%
General Government	\$830,733	\$888,891	\$884,548	\$960,124	\$71,233	8.0%
Charges for Services	\$10,265	\$5,245	\$5,366	\$5,366	\$121	2.3%
Interdepartmental	\$0	\$0	\$0	\$0	\$0	N/A
Other Revenue	\$9,676	\$8,175	\$8,891	\$8,591	\$416	5.1%
Total Revenues	\$850,674	\$902,311	\$898,805	\$974,081	\$71,770	8.0%
Tax Levy	\$902,732	\$1,190,350	\$1,097,340	\$1,218,352	\$28,002	2.4%

Position Summary (FTE)

Regular Positions	12.45	12.45	12.45	12.45	0.00
Extra Help	0.00	0.00	0.00	0.00	0.00
Overtime	0.25	0.20	0.20	0.21	0.01
Total	12.70	12.65	12.65	12.66	0.01

Departmental Objectives

1. Utilize community presentations, Senior Sources, the Caregiver Resource Library and other information media in order to educate clients, caregivers and the community on issues relating to crisis prevention. (Strategic Plan Goal 3.1) (4th Qtr 2004)
2. Promote crisis prevention and increase program access by providing descriptive information regarding the Caregiver Resource Library on the Department of Senior Service's web site. (Strategic Plan Goal 5.2) (2nd Qtr 2004)
3. Improve customer service by implementing the capability to complete application forms on-line through the Department of Senior Service's web site, including determination of specific program application forms to be included and coordination with the Department of Administration (DOA) Information Systems Division to design and implement the on-line forms. (Strategic Plan goal 5.2) (3rd Qtr 2004)
4. Collaborate with community resources to develop, produce and distribute information accessible to Spanish speaking older adults and their caregivers in order to empower older adults to resolve problems and increase access to information and services that help older adults maintain their independence. (Strategic Plan Goal 1.1) (4th Qtr 2004)

Major Departmental Strategic Achievements from 7/01/02 to 6/30/03

1. During the third quarter of 2002, the Department of Senior Services Benefit Specialist presented 21 SeniorCare information sessions to help older adults apply for prescription drug assistance.
 2. During the third quarter of 2002, provided counseling for crisis prevention and problem resolution to 91 caregivers at a Caregiver Conference coordinated with 12 community organizations.
 3. By fourth quarter of 2002, completed collaboration with 16 community agencies to implement an Interdisciplinary Team (I-Team) for intervention and prevention of Elder Abuse/Neglect.
 4. By fourth quarter 2002, presented 23 community programs that provided crisis prevention information, early intervention options and a discussion of available information resources.
 5. During first half of 2003, the Department of Senior Services, the Department of Health and Human Services (DHHS) and Department of Administration Information Systems Division continued to explore options for a shared automated case management system. The new case management system will supplement the capabilities of the current DHHS PeopleLink system and may eventually replace the Department of Senior Services FACTORS (Family Care Tracking System) software.
 6. During the first half of 2003, distributed 100 Spanish language packets to five area medical clinics on Power of Attorney for Health Care to increase service access for Spanish speaking older adults.
 7. During first half of 2003, collaborated with Donna Lexa Community Art Centers to implement an art therapy respite program that provides early intervention for caregiver grandparents to promote positive family relationships.
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Information and Assistance

Program Description

Entry point for accessing services for older people, providing relevant information and assistance, and filing reports of elder abuse and neglect.



Performance Measures

Increased community knowledge of prevention methods and program availability.
Dept. Std: 90% of session participants indicate increase.

	2002 Actual	2003 Budget	2003 Estimate	2004 Budget	Budget Change
	94.0%	75.0%	90.0%	90.0%	15.0%

Staffing (FTE)	3.17	3.16	3.16	3.15	(0.01)
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Personnel Costs	\$175,417	\$186,112	\$185,673	\$195,897	\$9,785
Operating Expenses	\$47,870	\$25,242	\$26,647	\$26,996	\$1,754
Interdept. Charges	\$14,715	\$35,314	\$37,965	\$46,023	\$10,709
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$238,002	\$246,668	\$250,285	\$268,916	\$22,248
General Government	\$80,865	\$66,236	\$72,272	\$98,897	\$32,661
Other Revenue	\$0	\$0	\$0	\$0	\$0
Total Revenues	\$80,865	\$66,236	\$72,272	\$98,897	\$32,661
Tax Levy	\$157,137	\$180,432	\$178,013	\$170,019	(\$10,413)

Program Highlights

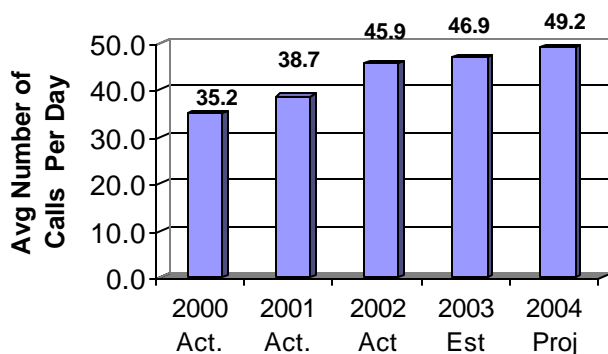
Additional personnel costs are due to scheduled step/merit increases and cost of benefits. Operating expenses are higher primarily due to purchase of additional items for the Title III E Caregiver Resource Library. Copying and postage costs associated with the Title III E Caregiver Support program increase interdepartmental charges.

The amount of General Government revenue available to partially offset program costs in 2004 results from additional allocated Older Americans Act Title IIIB Supportive Services funding of \$14,741 to \$53,099 and Title III E Caregiver Support funding of \$17,920 to \$45,798.

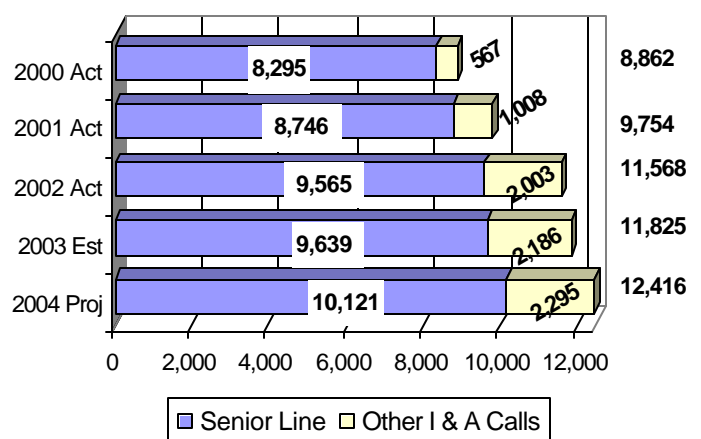
Activity

The total number of incoming Information and Assistance telephone calls continues to increase due to growth in the older adult population and increased caregiver and consumer awareness.

Average Daily Information and Assistance Telephone Calls



Annual Information & Assistance Telephone Calls



Case Management

Program Description

Needs assessment and case management are provided through a combination of telephone assistance and home visits.



Performance Measures

Individual Care Plans result in stabilization and enhanced independence.

Dept. Std: 75% of cases stabilized within 6 months.

The department strives to stabilize all cases continuing beyond 6 months.

2002 Actual	2003 Budget	2003 Estimate	2004 Budget	Budget Change
74.6%	75.0%	75.0%	75.0%	0.0%

Staffing (FTE)

1.74	1.71	1.71	1.73	0.02
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Personnel Costs	\$97,125	\$111,827	\$112,636	\$120,494	\$8,667
Operating Expenses	\$2,136	\$5,176	\$3,846	\$18,470	\$13,294
Interdept. Charges	\$7,440	\$11,246	\$11,120	\$11,492	\$246
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures:	\$106,701	\$128,249	\$127,602	\$150,456	\$22,207
General Government	\$26,050	\$29,175	\$28,126	\$31,813	\$2,638
Other Revenue	\$0	\$0	\$0	\$0	\$0
Total Revenues:	\$26,050	\$29,175	\$28,126	\$31,813	\$2,638
Tax Levy	\$80,651	\$99,074	\$99,476	\$118,643	\$19,569



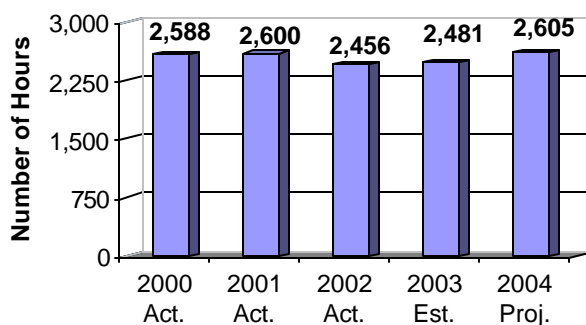
Program Highlights

Additional personnel costs are due to scheduled step/merit increases and cost of benefits and a slight increase in overtime of \$1,866. Operating expenses increase primarily due to annual subscription fee for SAMS (Social Assistance Management Software) case management software. Increases in General Government revenue are a result of increases in allocating Older Americans Act Title IIIB Supportive Services and Title IIIE Caregiver Support funding to this program area to partially offset program cost increases.



Activity

Case Management Units of Service



With the number of caregivers and frail elderly steadily increasing, 2004 case management services are projected to increase by 5% above 2003 estimated levels. To comply with funding source definitions, in 2002 and 2003, the Department began designating less complex information and referral requests as Assistance rather than Case Management, resulting in a slight drop in case management units of service in 2002 and 2003 (versus 2000 and 2001 actual).

Benefit Specialist

Program Description

Provides assistance to older adults in areas related to income maintenance, housing, surrogate decision making, consumer/finance issues, elder rights, legal and benefit problems, health care financing and reverse mortgage counseling.



Performance Measures

Improve financial security of clients by increasing number of clients receiving benefits.

Dept. Std: 5.0% increase from previous year.

	2002 Actual	2003 Budget	2003 Estimate	2004 Budget	Budget Change
	109 5.8%	116 5.5%	116 6.4%	122 5.2%	6 -0.3%

Staffing (FTE)

1.29	1.28	1.28	1.28	0.00
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Personnel Costs	\$71,234	\$78,325	\$78,434	\$83,947	\$5,622
Operating Expenses	\$2,266	\$2,700	\$1,700	\$2,270	(\$430)
Interdept. Charges	\$4,840	\$7,103	\$7,366	\$6,806	(\$297)
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures:	\$78,340	\$88,128	\$87,500	\$93,023	\$4,895
General Government	\$50,745	\$50,745	\$50,745	\$50,745	\$0
Other Revenue	\$230	\$500	\$220	\$250	(\$250)
Total Revenues:	\$50,975	\$51,245	\$50,965	\$50,995	(\$250)
Tax Levy	\$27,365	\$36,883	\$36,535	\$42,028	\$5,145



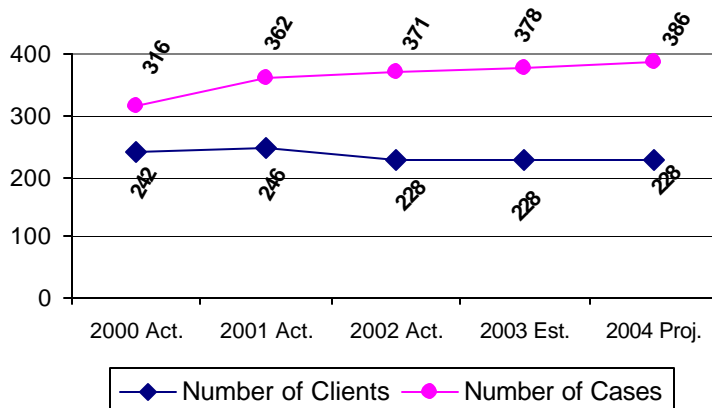
Program Highlights

The Department continues to provide benefit specialist services and assistance for the County's older adult population with one benefit specialist staff. Except for emergency crisis situations, the wait time for services is normally 3 – 4 weeks. Additional personnel costs are due to scheduled step/merit increases and cost of benefits.



Activity

Benefit Specialist Clients and Cases



Approximately 35% of clients using benefit specialist services have more than one open case during a year. The Benefit Specialist has an average of 100 – 120 open cases at any one time. Each case varies in complexity and time. With no change in staffing levels, the number of clients served is expected to remain unchanged. The increase in number of cases per client is expected to continue.

Community Services

Program Description

Services include a wide range of short-term and long-term community and intervention programs for older people and their families. Coordinates volunteer programs that provide opportunities for older adults to serve the community.



Performance Measures

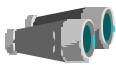
Overall incidence of needs met

2002 Actual	2003 Budget	2003 Estimate	2004 Budget	Budget Change
95.7%	90.0%	95.2%	95.0%	5.0%

Dept. Std: 95% positive response to Customer Survey regarding needs met and usefulness.

Staffing (FTE)	2.25	2.25	2.25	2.25	0.00
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Personnel Costs	\$98,332	\$110,420	\$109,809	\$116,289	\$5,869
Operating Expenses	\$224,583	\$287,780	\$271,816	\$310,556	\$22,776
Interdept. Charges	\$11,108	\$14,192	\$12,722	\$14,449	\$257
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures:	\$334,023	\$412,392	\$394,347	\$441,294	\$28,902
General Government	\$214,715	\$268,976	\$265,992	\$304,385	\$35,409
Charges for Services	\$9,967	\$5,245	\$5,366	\$5,366	\$121
Other Revenue	\$9,446	\$7,650	\$8,622	\$8,316	\$666
Total Revenues:	\$234,128	\$281,871	\$279,980	\$318,067	\$36,196
Tax Levy	\$99,895	\$130,521	\$114,367	\$123,227	(\$7,294)



Program Highlights

Additional personnel costs are due to scheduled step/merit increases and cost of benefits. Higher operating expenses are due primarily to increases in Older Americans Act and Elder Abuse/Neglect Prevention programs including \$21,158 for respite care related activities, \$2,500 for supportive home care and \$3,000 for caregiver counseling. Operating expenses also include an increase of \$1,183 for mileage reimbursement costs and \$2,000 for contracted chore services. Health care programs were reduced by \$7,011 based primarily on prior year's actual spending and use of the Elder Abuse/Neglect dental program (funds were reallocated to respite care related activities). Increases in General Government revenue result from additional allocated Elder Abuse/Neglect Prevention funding of \$992 to \$75,537 and Older Americans Act funding increases in Title IIIB Supportive Services of \$20,142 to \$150,139, Title IIID Disease Prevention and Health Promotion of \$2,976 to \$11,939, and Title IIIE Caregiver Support of \$11,299 to \$56,260.



Activity

People Served Through Purchased Community Services				
2000 Act	2001 Act	2002 Act	2003 Bud	2004 Proj
506	537	732	620	692

Increases in Older Americans Act funding totalling \$34,417 will allow service to 72 additional elderly people in 2004, an increase of 11.6% from 2003.

The number of volunteers is expected to remain approximately the same, with a slight increase in hours served. The value of hours is based on Waukesha County pay ranges for unclassified positions at \$6.98/hr in 2004 and semi-skilled positions at \$9.07/hr in 2004.

Opportunities to Serve the Community Through Volunteering						
	2000 Act	2001 Act	2002 Act	2003 Bud	2003 Est	2004 Proj
# Volunteers	970	1,175	1,310	1,175	1,310	1,310
Volunteer Hours	35,742	36,945	39,438	38,843	39,438	39,438
Value of Hours	\$206,433	\$237,859	\$261,611	\$265,271	\$269,337	\$276,060

Transportation Services

Program Description

Contracts for accessible specialized transportation services for older people and individuals with disabilities.



Performance Measures

	2002 Actual	2003 Budget	2003 Estimate	2004 Budget	Budget Change
Average cost per one-way trip, shared fare taxi program (one-way trip cost).	\$3.42	\$3.68	\$3.78	\$4.05	\$0.37
Net average cost per one-way trip (after client fees applied), RideLine program (one-way trip cost).	\$19.58	\$21.33	\$21.24	\$22.50	\$1.17
Maintain health by providing transportation for medical and nutrition purposes. Dept. Std: At least 85% of RideLine one-way trips will be for medical or nutrition purposes.	82.0%	80.0%	85.0%	85.0%	5.0%

Staffing (FTE)	1.30	1.30	1.30	1.30	0.00
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Personnel Costs	\$70,467	\$78,989	\$77,134	\$82,362	\$3,373
Operating Expenses	\$701,095	\$869,306	\$801,417	\$875,728	\$6,422
Interdept. Charges	\$6,985	\$12,639	\$10,903	\$12,502	(\$137)
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures:	\$778,547	\$960,934	\$889,454	\$970,592	\$9,658
General Government	\$458,358	\$473,759	\$467,413	\$467,413	(\$6,346)
Interdepartmental	\$0	\$0	\$0	\$0	\$0
Other Revenue	\$0	\$0	\$0	\$0	\$0
Total Revenues:	\$458,358	\$473,759	\$467,413	\$467,413	(\$6,346)
Tax Levy	\$320,189	\$487,175	\$422,041	\$503,179	\$16,004



Program Highlights

Additional personnel costs are due to scheduled step/merit increases and cost of benefits.

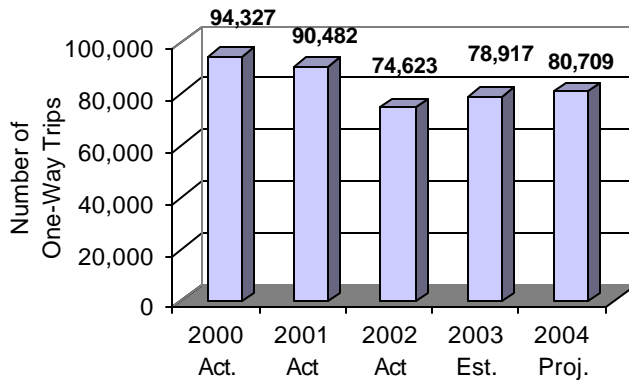
The total number of specialized transportation one-way trips is estimated to decrease by 938 one-way trips or 1.2% from the 2003 budgeted level, but will increase by 1,792 one-way trips or 2.3% from the 2003 estimate level. Increases of 4% in the gross unit rates for both RideLine contract and Shared-Fare Taxi costs are the primary reasons for higher operating expenses.

A slight decrease in the State of Wisconsin Department of Transportation (WIDOT) grant results in reduced General Government revenue. The WIDOT grant requires a 20% local match or tax levy funding of \$93,483.

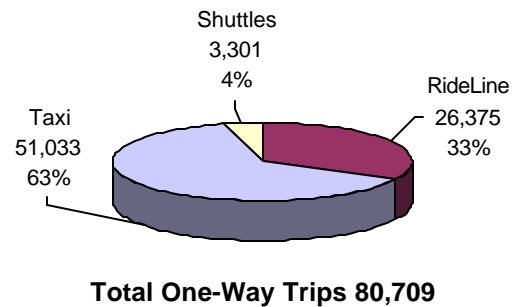


Activity

**Specialized Transportation
Total One-Way Trips**

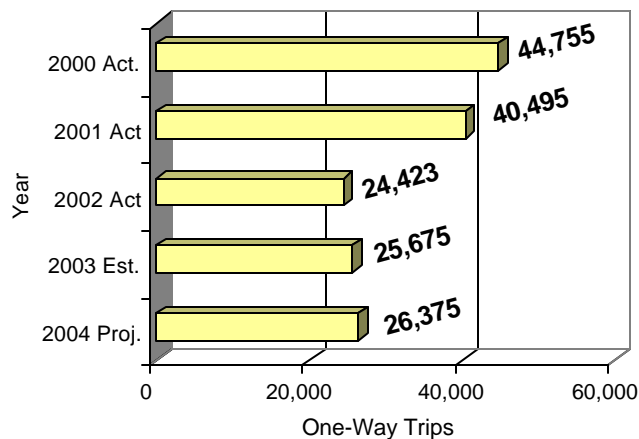


**Specialized Transportation
Year 2004 Projected One-Way Trips**



Total one-way trips reflect a reduction beginning in 2002 due to Department of Health and Human Services RideLine transportation being budgeted directly by that department. An increase of 1,792 one-way trips or 2.3% from 2003 estimate is projected for 2004. The majority of specialized transportation trips, 63%, are made in the Shared-Fare Taxi program.

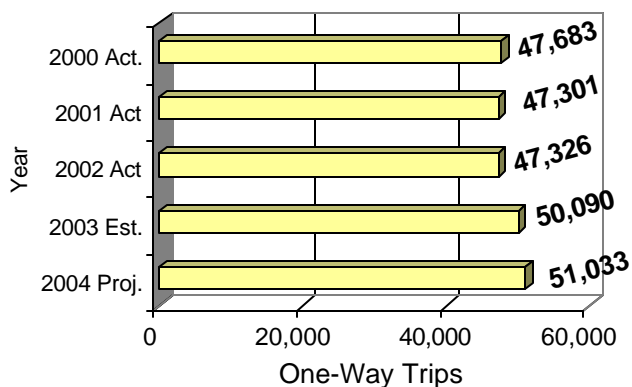
RideLine One-Way Trips



Beginning in 2002, Waukesha County Department of Health and Human Services (DHHS) began to directly purchase this service. Therefore, DHHS data is no longer included in one-way trips provided after 2001. This is main reason for the reduction in one-way trips from 2001 actual to 2002 actual.

An additional 700 one-way trips or 2.7% increase in 2004 from the 2003 estimate is projected for RideLine. Majority of projected increase in one-way trips is for medical, nutrition and employment related purposes.

Shared-Fare Taxi One-Way Trips



An additional 943 one-way trips or 1.9% increase from 2003 estimate is projected for the Shared-Fare Taxi program due to increased taxi utilization outside the City of Waukesha service area.

Adult Day Care

Program Description

Partially subsidizes services provided by contracted adult day centers. Coordinates with Adult Day Center Network to address service delivery needs, including needs related to Alzheimer's Disease, dementia and other chronic disorders.



Performance Measures

Average net cost per day of care for clients subsidized by the Department of Senior Services.

	2002 Actual	2003 Budget	2003 Estimate	2004 Budget	Budget Change
	\$23.73	\$25.70	\$28.69	\$28.82	\$3.12

Staffing (FTE)

0.30	0.30	0.30	0.30	0.00
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Personnel Costs	\$20,646	\$21,962	\$21,941	\$23,157	\$1,195
Operating Expenses	\$34,963	\$53,648	\$46,716	\$53,648	\$0
Interdept. Charges	\$317	\$207	\$207	\$199	(\$8)
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures:	\$55,926	\$75,817	\$68,864	\$77,004	\$1,187
Charges for Services	\$298	\$0	\$0	\$0	\$0
Other Revenue	\$0	\$0	\$0	\$0	\$0
Total Revenues:	\$298	\$0	\$0	\$0	\$0
Tax Levy	\$55,628	\$75,817	\$68,864	\$77,004	\$1,187



Program Highlights

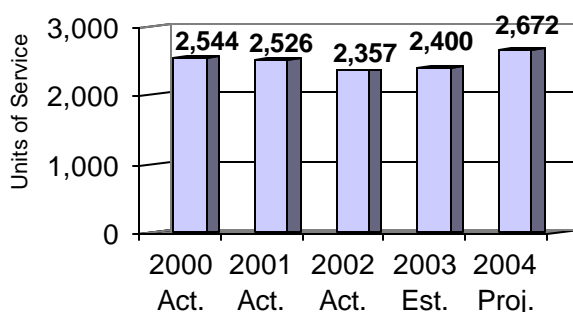
Additional personnel costs are due to scheduled step/merit increases and cost of benefits.

Adult Day Care is subsidized based on a participant's ability to pay. With more individuals projected to need a higher subsidy coupled with increases in contract rates following a new Request for Proposal the net cost per day of care for subsidized clients is projected to increase by \$3.12 or 12.1%.



Activity

Adult Day Centers
Units of Subsidized Service



An additional 272 days of adult day care, an increase of 11.3% from the 2003 estimate, will raise the number of people served from 35 in the 2003 estimate to 39 projected for 2004. On average, 1.3 days of care per week per client are subsidized through the program.

Administrative Services

Program Description

The Administrative Services program is responsible for coordinating and providing efficient administrative/ clerical support.

**Performance Measures**

Administration Expenditures
as % of total Department
Expenditures

2002 Actual	2003 Budget	2003 Estimate	2004 Budget	Budget Change
5.9%	5.7%	5.8%	5.7%	0.0%

Staffing (FTE)

2.65	2.65	2.65	2.65	0.00
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Personnel Costs	\$142,103	\$154,997	\$152,722	\$162,988	\$7,991
Operating Expenses	\$7,241	\$8,404	\$9,266	\$10,138	\$1,734
Interdept. Charges	\$12,523	\$17,072	\$16,105	\$18,022	\$950
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures:	\$161,867	\$180,473	\$178,093	\$191,148	\$10,675
General Government	\$0	\$0	\$0	\$6,871	\$6,871
Other Revenue	\$0	\$25	\$49	\$25	\$0
Total Revenues:	\$0	\$25	\$49	\$6,896	\$6,871
Tax Levy	\$161,867	\$180,448	\$178,044	\$184,252	\$3,804

**Program Highlights**

Administrative staffing levels remain unchanged from the 2003 budget. Additional personnel costs are due to scheduled step/merit increases and cost increases of benefits. Funding for a replacement fax machine and ergonomic chair, as well as projected increases in supplies and equipment maintenance agreements account for higher operating expenses in 2004.

Older Americans Act Title IIIB Supportive Services funding, which includes an increase of \$6,871 from \$0.00 in previous years, comprises General Government revenue in 2004 and is allocated to cover associated personnel costs.

Fund Purpose

The Department of Senior Services' Elderly Nutrition Programs, Congregate and Home Delivered Meals, function under the provisions of the Title IIIC-1 and C-2 Older Americans Act, as amended. The programs provide low cost nutritious meals meeting one third of the recommended dietary allowance to persons age 60 or older with emphasis placed on outreaching the targeted frail, isolated, homebound and disadvantaged older population.

As mandated, the Congregate and Home Delivered Meals Programs coordinate a wide range of services for older people including nutrition education, information, referral, and case management and support with the formal and informal support systems of the older population. The nutrition programs contribute significantly to helping older people remain healthy, active and independent in their homes and communities.

Financial Summary

	2002 Actual	2003 Adopted Budget	2003 Estimate	2004 Budget	Change from 2003 Adopted Budget	
					\$	%
Nutrition Fund						
Personnel Costs	\$383,888	\$406,307	\$405,210	\$452,120	45,813	11.3%
Operating Expenses	\$575,512	\$620,207	\$616,620	\$652,472	32,265	5.2%
Interdept. Charges	\$32,441	\$42,186	\$40,894	\$41,482	(704)	-1.7%
Fixed Assets	\$0	\$0	\$0	\$0	0	N/A
Total Expenditures	\$991,841	\$1,068,700	\$1,062,724	\$1,146,074	77,374	7.2%
General Government	\$500,457	\$492,106	\$494,724	\$601,354	109,248	22.2%
Interdepartmental	\$30,417	\$41,338	\$36,262	\$41,338	0	0.0%
Other Revenue (a)	\$294,161	\$343,444	\$342,254	\$315,376	(28,068)	-8.2%
Total Revenues	\$825,035	\$876,888	\$873,240	\$958,068	81,180	9.3%
Tax Levy (b)	\$166,806	\$191,812	\$189,484	\$188,006	(3,806)	-2.0%

Position Summary (FTE)

Regular Positions	4.30	4.30	4.30	8.60	4.30
Extra Help	6.24	6.26	6.28	2.38	(3.88)
Overtime	0.01	0.01	0.01	0.01	0.00
Total	10.55	10.57	10.59	10.99	0.42

(a) Includes fund balance appropriation of \$41,000 in 2003 adopted budget and \$10,150 in 2004 budget.

(b) Adopted Tax Levy for 2002 was actually \$169,044. Amount shown is actual expenditures minus actual revenues, a difference of \$2,238 from the 2002 Adopted Tax Levy amount.

Departmental Objectives

1. Through provision of nutritious meals and nutrition education, reduce by 20% the average nutrition risk score of home delivered meal participants who had been assessed to be at high risk in 2003. (Strategic Plan Goal 3.2) (4th Qtr 2004)
2. Expand informational opportunities and enhance wellness through a "Lunch and Learn" program at two Senior Dining Centers. (Strategic Plan Goal 1.2) (4th Qtr 2004)
3. Increase volunteerism and community collaboration through the "Adopt-a-Route" program at selected meal sites for the Home Delivered Meals program. (Strategic Plan Goals 4.1 and 1.3) (4th Qtr 2004)

Major Departmental Strategic Achievements from 7/01/02 to 6/30/03

1. By fourth quarter of 2002, the average nutrition risk score of home delivered meal recipients who had been at high risk in 2001 had been reduced by 26.1% from an average score of 13.53 to an average score of 10.00. Risk will continue to be reassessed annually.
 2. During fourth quarter of 2002, received grant award from the Oconomowoc Area Foundation Scherffius Fund for chairs for the Oconomowoc Senior Dining Center.
 3. During first half of 2003, celebrated the twenty-fifth anniversary of the Senior Dining program in Waukesha County with special meals and events at the dining centers. 1,090 older adults participated in the celebrations at the dining centers.
 4. During first half of 2003, reviewed availability of community meal options with the Nutrition Coalition. Information will be distributed during the second half of 2003.
 5. During second quarter of 2003, participated in planning and presenting the "Heart Health" kickoff for Waukesha County in collaboration with the Waukesha County Health Council.
 6. During second quarter of 2003, distributed 53 "Reach" food boxes to older adults in four subsidized apartment buildings. Food boxes were provided to Waukesha County through Second Harvest of Milwaukee as a result of the State of Wisconsin vitamin settlement award.
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Home-Delivered Meals

Program Description

Provides meals to frail and homebound people age 60 or older who are unable to prepare their own meals. Further nutritional support is provided to high-risk recipients through nutrition education, including home visits and individualized nutritional counseling.

**Performance Measures**

Reduced nutrition risk scores for high risk HDM participants. Dept. Std: 20% (10% prior to 2003) reduction from average score of previous year's high risk participants.

2002 Actual	2003 Budget	2003 Estimate	2004 Budget	Budget Change
Average Score =10.0 26.1% reduction	Average Score= 10.9 20.0% reduction	Average score = 10.8 20.0% reduction	Average score = 10.8 20.0% reduction	0.0%

Increased ability to live independently. Dept. Std: 75% positive response to Customer Survey.

83.7%	75.0%	73.8%	75.0%	0.0%
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Gross Cost Per Meal	\$6.67	\$6.71	\$6.82	\$7.16	\$0.45
Avg. client donation per meal	\$2.00	\$1.94	\$1.95	\$1.95	\$0.01
Net cost per meal	\$4.67	\$4.77	\$4.87	\$5.21	\$0.44

Staffing (FTE)	5.53	5.54	5.55	5.75	0.21
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Personnel Costs	\$203,377	\$215,833	\$215,266	\$239,431	\$23,598
Operating Expenses	\$349,364	\$368,360	\$362,789	\$384,413	\$16,053
Interdept. Charges	\$14,691	\$17,765	\$16,669	\$17,926	\$161
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$567,432	\$601,958	\$594,724	\$641,770	\$39,812
General Government	\$197,654	\$182,271	\$185,369	\$232,886	\$50,615
Interdepartmental	\$30,417	\$41,338	\$36,262	\$41,338	\$0
Other Revenue (a)	\$173,517	\$186,537	\$182,205	\$179,540	(\$6,997)
Total Revenues	\$401,588	\$410,146	\$403,836	\$453,764	\$43,618
Tax Levy (b)	\$165,844	\$191,812	\$190,888	\$188,006	(\$3,806)

(a) Includes fund balance appropriation of \$8,438 in 2003 adopted budget and \$1,125 in 2004 budget.

(b) Adopted Tax Levy for 2002 was \$169,044. Amount shown is actual expenditures minus actual revenues, a difference of \$3,200.

**Program Highlights**

The conversion of seven site manager positions from seasonal to regular part time classification beginning in 2004 is reflected in the increased personnel costs. Increases in employee benefit costs and scheduled merit/step advances also contribute to additional costs.

An increase of \$1,723 in volunteer mileage reimbursement for delivery of meals plus projected increases in food costs of \$14,166 which is based on a 3% food vendor cost increase, account for the majority of the \$16,053 increase in operating expenses.

General Government revenues increase due to additional allocated Federal Older Americans Act Title IIIC-2 Home Delivered Meal funding which increases \$35,500 from \$124,564 in the 2003 adopted budget to \$160,064 in the 2004 budget, and allocation of the Federal Older Americans Act Title IIIC-1 Congregate funding provided to the Home Delivered Meals program which increases \$15,115 from \$0.00 in the 2003 adopted budget.



Activity

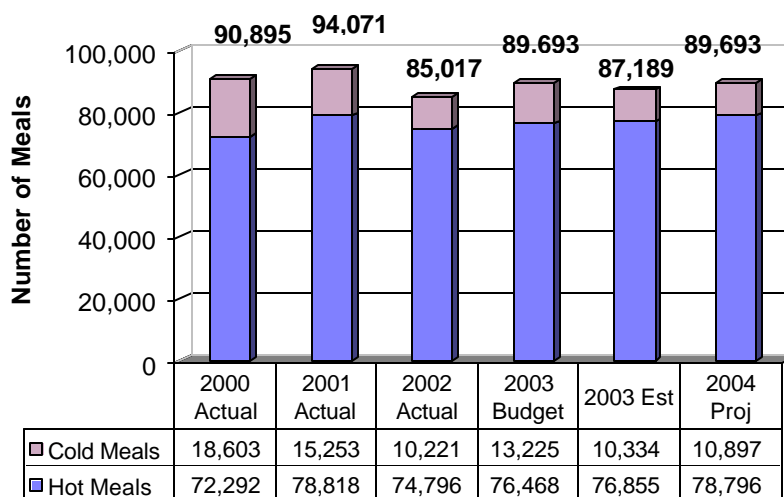
The Administration on Aging established core nutrition risk definitions that are incorporated into the Nutrition Check Plus screening tool to determine nutrition problems that could interfere with future health and independence. A Department strategic objective addresses the need to reduce high risk scores. Risk is assessed annually or more frequently if warranted.

NUTRITION CHECK PLUS

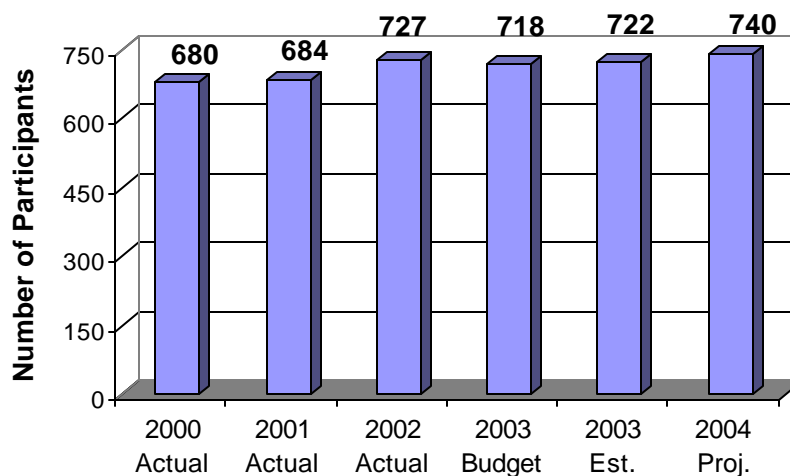
<u>Risk</u>	<u>Score</u>
Low	0 – 4
Moderate	5 – 9
High	10 or more

Although the total 2004 home delivered meals are expected to remain at the 2003 budgeted level, hot meals will increase by 2,328.

Total Home Delivered Meals Served



Number of Registered Home Delivered Meal Program Participants



Based on additional availability of hot meals in 2004, the number of registered participants is expected to increase by 3.1% from the 2003 budgeted level.

Congregate Nutrition

Program Description

Provides a noon meal with socialization, education and information sessions at neighborhood senior dining centers for individuals eligible under the Older Americans Act and the Wisconsin Elderly Nutrition Program.



Performance Measures

	2002 Actual	2003 Budget	2003 Estimate	2004 Budget	Budget Change
Gross Cost per meal	\$6.93	\$7.36	\$7.24	\$7.87	\$0.51
Average donation per meal	\$1.93	\$1.95	\$1.97	\$1.97	\$0.02
Net cost per meal	\$5.00	\$5.41	\$5.27	\$5.90	\$0.49
Reduce isolation through socialization opportunities at lunch centers, as measured by 83% positive response (Dept. Std) to customer survey.	83.3%	75.0%	85.5%	83.0%	8.0%

Staffing (FTE)	5.02	5.03	5.04	5.24	0.21
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Personnel Costs	\$180,511	\$190,474	\$189,944	\$212,689	\$22,215
Operating Expenses	\$226,148	\$251,847	\$253,831	\$268,059	\$16,212
Interdept. Charges	\$17,750	\$24,421	\$24,225	\$23,556	(\$865)
Fixed Assets	\$0	\$0	\$0	\$0	\$0
Total Expenditures:	\$424,409	\$466,742	\$468,000	\$504,304	\$37,562
General Government	\$302,803	\$309,835	\$309,355	\$368,468	\$58,633
Other Revenue (a)	\$120,644	\$156,907	\$160,049	\$135,836	(\$21,071)
Total Revenues:	\$423,447	\$466,742	\$469,404	\$504,304	\$37,562
Tax Levy (b)	\$962	\$0	(\$1,404)	\$0	\$0

(a) Includes fund balance appropriation of \$32,562 in 2003 adopted budget and \$9,025 in 2004 budget.

(b) Adopted Tax Levy for 2002 was actually \$0.00. Amount shown is actual expenditures minus actual revenues, a difference of an additional \$962.



Program Highlights

The conversion of seven site manager positions from seasonal to regular part time classification beginning in 2004 is reflected in the increased personnel costs. Increases in employee costs and scheduled merit/step advances also contribute to additional costs.

Replacement steam tables and coffee pots will be purchased for the senior dining centers, accounting for an increase of \$8,025 in operating expenses. Remaining increase in operating expenses is due to projected increases in food costs of \$8,555 based upon a 3% food vendor cost increase.

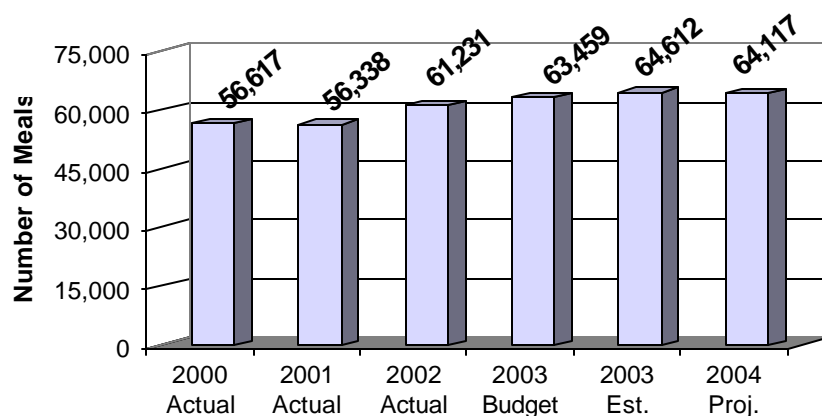
General Government revenues increase due to additional allocated Older Americans Act Title IIIC-1 Congregate Meal funding of \$58,633 utilized in the Congregate program, from \$272,837 in the 2003 adopted budget to \$331,470 in 2004.

Reduction of Other Revenue results from budgeting \$9,025 of Nutrition fund balance for 2004, a decrease of \$23,537 from the 2003 adopted budget level of \$32,562. This decrease is slightly offset by a projected increase in client donations of \$2,566.

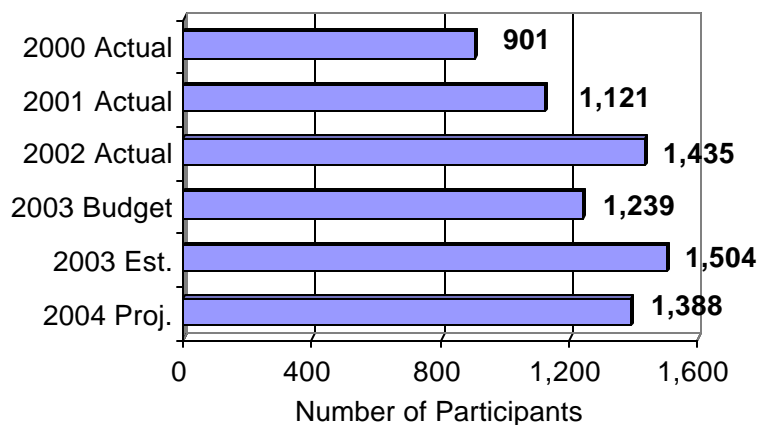


Activity

Number of Congregate Meals Served



The number of meals served in the 2004 congregate program is expected to increase slightly from 2003 budgeted level, and will be slightly below the 2003 estimated level. Growth in number of meals is expected to stabilize following completion of a 2001/2002 strategic marketing objective.

Congregate Meal Program
Registered Participants

The increase in 2003 estimated participants and projected decrease in 2004 are a result of 25th Nutrition Program Anniversary celebrations, which will not be held in 2004.

Number of Nutrition Education Sessions
at Senior Dining Centers

2000 <u>Actual</u>	2001 <u>Actual</u>	2002 <u>Actual</u>	2003 <u>Estimate</u>	2004 <u>Projection</u>
112	250	474	500	500

Data for 2000 based on 15 Senior Dining Centers, for 2001 on 14 Senior Dining Centers and for 2002, 2003 and 2004 on 13 Senior Dining Centers.